

TOWN OF NEEDHAM

MBMB PERFORMANCE EVALUATION POLICY #422

1. PURPOSE AND SCOPE

The Purpose of this policy is to outline the Town's Municipal Building Maintenance Staff performance evaluation program. The performance evaluation program has been developed to accomplish several goals: to continuously improve the effectiveness and efficiency of Town services; to provide an opportunity for two-way communication and planning between employees and supervisors; to assist employees in increasing the effectiveness of their job performance; to provide a mechanism for the establishment of individual and departmental goals; to serve as the basis of acknowledging employee's accomplishments and recognizing employee's potential need for guidance, training, and/or support; and to provide documentation of employee performance to serve as the basis for salary adjustments and personnel actions, where applicable.

2. APPLICABILITY

This policy applies to employees in the Municipal Building Maintenance Department.

3. DEFINITIONS

Refer to the Glossary of Terms in the Personnel Policy Manual for commonly used words and phrases.

4. POLICY

It is the policy of the Town of Needham that all full-time and permanent part-time employees will be formally evaluated on an annual basis. Additionally, employees who are nearing the end of any probationary period will be evaluated prior to the determination as to whether the employee should be retained on a permanent basis. Informal evaluation of employees will occur throughout the year.

5. GENERAL PROCEDURES

5.1 Coordination

The performance review system will be monitored by the Assistant Town Administrator. Coordination will include the following tasks:

- 5.1.1** Informing department managers as to which reviews need to be completed;
- 5.1.2** Providing supervisors with the performance review forms needed to complete the reviews;
- 5.1.3** Monitoring the completion of reviews;
- 5.1.4** Placing the completed reviews in employees' official personnel files;
- 5.1.5** Keeping employee reviews in a secure file to protect confidentiality; and

5.1.6 Regulating access to employee review files.

5.2 Forms

All employees will be evaluated using the Employee Performance Review Form, or Trades Employee Performance Review Form, whichever is appropriate.

5.3 Timing

All employees will be formally evaluated prior to the conclusion of the probationary period, and annually thereafter on their anniversary or step date (employees hired prior to July 1, 1997 will be evaluated on or about July 1st of each year, unless their step date has been adjusted due to promotion or other personnel action). Informal evaluation of employee performance is on-going throughout the year.

5.4 Meetings

The evaluator will hold a private meeting with each of his or her employees to discuss the employee's performance over the preceding year. Supervisory employees will then review the evaluation with the appropriate facility administrator prior to finalizing the evaluation.

<u>Employee Group</u>	<u>Evaluator</u>	<u>In Consultation With</u>
Junior Custodians	Sup. Custodial Services	Senior Custodian/Facility Administrator
Senior Custodians	Sup. Custodial Services	Facility Administrator
Maintenance/Trades	Dir. Municipal Bld. Maint.	n/a

5.5 Compensation

Employees hired after July 1, 1997 are eligible for satisfactory performance step increases annually at the time of their anniversary date, after the review is completed. The Director of Municipal Building Maintenance will complete a Payroll Authorization Form and forward it to the Assistant Town Administrator, along with the Performance Review Form, as soon as the review is completed.

Step increases for employees hired prior to July 1, 1997 will continue to be automatic, and will be processed each July. Employees hired prior to July 1, 1997 whose step date has been adjusted due to promotion or other personnel action will receive satisfactory performance step increases at the time of their anniversary date, after the review is completed.

5.6 Employee Grievances

If an employee disagrees with his or her review, he or she may provide comments in the space provided. If the disagreement cannot be resolved within the department, the supervisor should refer the employee to the appropriate grievance or appeal procedure contained in the collective bargaining agreement.

6. EVALUATION PROCEDURES

6.1 Performance Standards

In this portion of the form, the supervisor reviews various aspects of the employee's performance using the Rating Guide set forth below.

Outstanding:	Performance exceeds the supervisor's expectations
Highly Effective:	Performance meets and occasionally exceeds the supervisor's expectations
Satisfactory:	Performance meets the supervisor's expectations
Unsatisfactory:	Performance is generally and routinely unacceptable.

A narrative description of the performance must accompany any ranking of AUnsatisfactory."

6.1.1 Productivity

- X Quantity of output viewed in terms of the general volume of activity in the department; amount of work assigned versus amount produced; amount of assigned work back-logged; volume of output compared to other staff.
- X "Interruptability quotient" -- ability to immediately resume work on one task after being interrupted to perform another task; ability to shift gears without coming to a halt.

6.1.2. Quality/Job Knowledge

- X Understanding of, and compliance with, departmental rules, procedures, workflow, policies and operations.
- X Understanding own job responsibilities and how they fit into departmental operations; initiative in learning the responsibilities of other department positions, when appropriate.
- X Having any special skills required by the department; willingness and initiative taken to acquire additional knowledge and assume new tasks.
- X General understanding of departmental operations; knowing when to answer a question and when and how to refer it to someone else.
- X Organizational skills; ability to pace workflow and schedule time, timeliness of work.
- X General appearance of finished work products.
- X Accuracy of work -- number of errors or corrections.
- X Number of complaints or problems received from the public and other department staff due to work errors.

6.1.3 Interpersonal Skills/Customer Service

- X Ability to get along with others in the division; ability to avoid or handle minor conflicts without the intervention of the supervisor.
- X Consistent attention to and patience with the public; tolerance of diversity; willingness to go out of one's way to assist the public and other employees, a consistently pleasant manner.

- X Ability to effectively handle complaints and problems.
- X Ability to resolve conflict rather than creating animosity.
- X Employee demonstrates appropriate level of information flow to supervisor, other employees.
- X Listening skills, the ability to understand questions and obtain additional information needed to answer correctly.

6.1.4 Work Habits

- X Degree of thoroughness applied to tasks; ability to follow work through to completion.
- X Appropriate attendance level.
- X Consistently punctual; appropriate use of "breaks."
- X Works independently without requiring constant supervision.
- X Willingness to take on extra work when required by circumstances.
- X Performs work in such a fashion that the supervisor can rely on the work as accurate and timely.

6.1.5 Work Attitude

- X Willingness to cooperate with peers and supervisor; ability to give and receive help; offering assistance to other divisions when workflow allows.
- X Employee is self-motivated, and demonstrates initiative.
- X Employee exhibits flexibility under changing conditions.
- X Ability to accept and understand criticism and to take appropriate action to correct and improve performance.

6.1.6 Supervisory Skills (If Appropriate)

- X Management skills -- success in planning and organizing work and achieving goals within scheduled time and fiscal limits.
- X Motivation of employees -- success in gaining cooperation and high level of performance from employees supervised.
- X Development of employees -- success in training employees in skills required for assigned duties as well as providing for flexibility in back-up.

6.2 Overall Evaluation for the Review Period

In the space provided, or on attached sheets if necessary, the evaluator should prepare a brief narrative detailing his/her overall evaluation of the employee for the previous review period.

6.3 Employee Development Plan (Optional)

The evaluator should encourage employees to discuss options for personal and professional development. Examples include training opportunities the employee might be interested in, requests for flexible working hours to accommodate child care or educational endeavors, interest in learning new skills to prepare for promotion, etc.

6.4 Employee Comments (Optional)

Any employee who wishes to comment will have the opportunity to do so before the evaluation is placed in his/her personnel file. This step is not mandatory, it is entirely at the employee's discretion.

6.5 Additional Trades Evaluation Components

6.5.1 Evaluation of Goals for Previous Review Period (Optional)

The supervisor and the employee review the goals set the previous year. Goals may be modified during the year if circumstances require. If a particular goal was not achieved through no fault of the employee, the evaluator should indicate that fact in the space provided.

6.5.2 Goal Setting for Next Review Period (Optional)

The evaluator and the employee mutually agree on the goals to be set for the coming year. Each goal should be a concise statement of the objectives to be attained within the performance period, and should have a specific target date.

6.5.3 Extraordinary Service (Optional)

The evaluator and the employee may use this space to comment on any work performed beyond the employee's normal scope of work, work that is extraordinary in nature, and/or work that had a direct impact on the health and safety of the work environment and staff.

ATTACHMENT 1

Performance Evaluation Tips

1. Schedule the performance review meeting with the employee several days in advance.
2. Reserve a private room for the meeting where you will be undisturbed.
3. Review the employee's job description and note any changes which need to be discussed.
4. Provide the employee with a copy of the performance review form prior to the meeting.
5. Review any notes from regular supervisory sessions with the employee, any incident file, any special achievements or problem areas, and obtain input from other departments as needed.
6. Honestly critique your own performance as a supervisor during the review period.
7. Specifically define any problem areas and possible solutions prior to presenting them to the employee.
8. Outline the meeting format beginning with positive recognition for areas of strength.
9. Focus on job performance, not personality, as you evaluate each employee. It is your job to be fair and equitable, and to listen to the employee's point of view.

ATTACHMENT 2

The Performance Review Meeting

1. Be on time and devote your complete attention to this meeting.
2. Share with the employee the outline of the meeting, noting areas for discussion.
3. Ask the employee if there are any specific questions/problems that he/she would like to discuss and set these items into the agenda.
4. Review the previous year's Performance Evaluation Form, any mid-year discussions or special achievements, or other unique circumstances with the employee.
5. Compliment the employee on specific job accomplishments and strengths.
6. Review the completed Performance Evaluation Form with the employee if you have prepared it in advance. Some department heads prefer to complete the form after the meeting. In this case, you should provide the employee an opportunity to respond to the form after you have given it to him/her.
7. Present specific areas for improvement and discuss them with the employee. Listen carefully to the employee's point of view and his/her suggestions for how the problem could be resolved. Also ask the employee how you may assist him/her in this process.
8. Mutually agree on goals for improving problem areas and schedule a follow-up meeting to discuss progress within one month (if applicable).
9. Discuss any changes in job responsibility/career plans with the employee and consider advancement opportunities and training needs of the employee.
10. Have the employee sign the Performance Evaluation Form and comment as needed and return the form to the Personnel Department.
11. Regular on-going meetings with your employees and coaching sessions with employees experiencing problems will facilitate smoother review meetings with each of your employees since you will both be up-to-date on performance issues.

ATTACHMENT 3

Coaching Questionnaire for Supervisors

Coaching is a process used by supervisors to help an employee improve job performance. This questionnaire is designed to help supervisors clarify the specific job performance problem and determine a useful strategy prior to beginning the coaching process.

1. Identify the specific behavior (e.g., the employee is consistently 15 minutes late for work) that causes the unsatisfactory job performance. Link the behavior to the employee's job description.
2. Is the job performance problem important enough to warrant your time and energy to correct it?
If no, then don't waste your time on it. Consider the implications of the behavior on other employees -- will they be allowed the same latitude?

If yes, let your employee know that his/her performance is unsatisfactory and that both of you are going to work towards resolving the problem.

3. Does the employee agree that there is a job-performance problem in this area?

If no, refer the employee to his/her job description or workplace procedures and clarify the expected standards of performance.

If yes, ask the employee for a commitment to resolve the problem.

4. Prior to the coaching interview, ask yourself the following questions:
 - a. Are there obstacles outside of the employee's control that prevent him/her from performing the desired behavior?
 - b. Does the employee have the ability to perform the desired behavior? Is the employee motivated to do so?
 - c. Has the employee received enough or appropriate training?
 - d. What will be the consequences if the employee does not resolve the problem?
 - e. If the employee resolves the problem and achieves satisfactory work performance, what will be the reward/positive recognition?

ATTACHMENT 4

Interview Steps for Coaching Meeting with Employee

- Step One** In a private meeting with the employee, introduce the problem in a positive manner, acknowledging the employee's strengths on the job. Use the Coaching Meeting Topics for Discussion Form as a guide.
1. Be specific in describing the problem, using examples.
 2. Ask the employee to verify and clarify the problem.
 3. Negotiate a mutual agreement on the exact problem and the exact behavior required on the job. Do not continue until you have reached agreement.
- Step Two** Identify and write down all possible solutions to the problem together, making sure to address the causes of the problem. Listen carefully to the employee's input and objections.
- Step Three** Agree on a solution to the problem and develop an action plan. Write down the specific actions that each of you will take, and include completion dates.
- Step Four** Schedule a follow-up meeting within one week; include the date, time and method by which progress will be measured. Another follow-up meeting in one month is advisable.
- Step Five** Reinforce and review all written agreements and be clear with the employee about the consequences of failure to reach resolution of the issue. Try to close the meeting on a positive note.

ATTACHMENT 5

Coaching Meeting Topics for Discussion

Describe the job performance issue to be discussed. Mutually agree on the specifics of the problem and the desired behavior required to resolve it.

Discuss solutions which could improve the job performance problem.

Select one solution and write out the actions steps and completion dates.

Follow-up meeting dates: